ACCESS *ai* IDAHO

PAYPORT™

Catalog Manager
User Manual

PayPort™ conveniently enables your agency to accept Discover, MasterCard and VISA payments from customers who pay in person, by fax, or by telephone for virtually any type of sales transaction.

This manual illustrates how to set up and manage your customizable credit/debit card processing system.

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Section 1: Help Contacts

For PayPort questions or assistance, please contact Access Idaho:

PHONE: Boise Area: 208-332-0102
                Toll free: 1-877-4ID-EGOV (1-877-443-3468)
                 (Business days from 8 am-5 pm MT)

EMAIL: support@accessidaho.org

MAIL: Access Idaho
                999 W. Main St., Ste. 910
                Boise, ID 83702-9010

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Section 2: Logging into the AcID Framework Online Administration System

The web address for the AcID Framework secure login page is:

https://www.accessidaho.org/framework/manager.html

Add this web page to your favorites list for easy reference.

Note: *The first time you log into the AcID Framework, you may be prompted to change your password to one of your choosing. Passwords are case-sensitive, must be at least 5 characters long, and can contain numbers, letters, and/or symbols. For security purposes, do not allow your web browser (Internet Explorer, Netscape, etc.) to remember your login information.*

After logging in successfully, you will see the screen below (your Manager Options list may differ slightly):

Section 3: Preparing to Set Up Catalogs

You must create catalogs first. Your agency's clerks will not be able to log-in until you associate their usernames with at least one catalog. Also, your financial reports cannot be accessed without at least one catalog associated with your account.

Step 1. **Make a master list of items you would like to sell.**

Example Master List:

- Filing
- Amended Filing
- Batch Filing
- Fines
- Photocopies
- Professional License Renewal
- License Verification Request
- Permit
- Duplicate License
- Late Fee
- Continuing Education Course
- Recording Fee
- Processing Fee
- Shipping
- Document Order
- Document Search
- PayPort Mug
- PayPort T-Shirt
- Professional Manual
- Diskette/CD
- Fax
- Mailing List
- Labels

Step 2. **If applicable, organize your list into catalog types (see below).**

Step 3. **Assign each item a unique catalog number (all numbers, all letters, or alphanumeric) that is easy for clerks to type in.**

NOTE: Catalog numbers <u>cannot</u> be changed or deleted.

Documents		Licensing & Permitting		Merchandise	
100.	Document Request	200.	License Renewal (ID)	300.	T-Shirt, X-Small (Tax)
101.	Document Search	201.	License Renewal (Non-ID)	301.	T-Shirt, X-Small (No Tax)
102.	Filing	202.	License Duplicate	302.	T-Shirt, Small (Tax)
103.	Amended Filing	203.	License Verification	303.	T-Shirt, Small (No Tax)
104.	Copies	204.	Continuing Ed Course	304.	T-Shirt, Med. (Tax)
105.	Diskette/CD	205.	Professional Manual	305.	T-Shirt, Med. (No Tax)
106.	Batch Filing	206.	Permit (ID)	306.	T-Shirt, Large (Tax)
107.	Recording Fee	207.	Permit (Non-ID)	307.	T-Shirt, Large (No Tax)
108.	Processing Fee	500.	Fines	308.	T-Shirt, XL (Tax)
800.	Fax	600.	Late Fee	309.	T-Shirt, XL (No Tax)
900.	Shipping (USPS)	700.	Mailing List	400.	PayPort Mug (Tax)
901.	Shipping (2-day Air)	750.	Labels	401.	PayPort Mug (No Tax)
902.	Shipping (Overnight)	800.	Fax	900.	Shipping (USPS)
		900.	Shipping (USPS)	901.	Shipping (2-day Air)
		901.	Shipping (2-day Air)	902.	Shipping (Overnight)
		902.	Shipping (Overnight)		

The same item can be listed in more than one catalog.

Section 4: Adding a New Catalog

Add a new catalog only after you have determined what items you would like in it (please see Section 3 for recommended organizational steps).

Step 1. **Select "PayPort Catalog Manager" link.**

This link allows you to:
- *Add Catalogs*
- *Edit Catalogs*
- *Print Catalogs*
- *Manage Users*
- *Manage Groups*
- *Enter Sales Data*
- *Search/Print Receipts*

Step 2. **Enter desired catalog name and select "Create."**

By default, PayPort Administration begins with the "Edit Catalogs" section.

Give each catalog its own unique name.

Section 5: Editing Catalogs

The "Edit Catalogs" feature allows you to add new catalogs and modify existing ones.

Step 1. **Select the "New Item" button to enter item information.**

Step 2. **Enter item information.**

Step 3. The "Other Options" button (see previous page) allows you to change item variables.

Default amounts

Displays a field in the transaction screen to enter additional detail about an item (e.g. license number, document type, description, etc.)

When other catalogs are created, you have the option of adding the same item to them too by selecting their boxes.

Step 4. The "Quantity Discount" button allows you to set different pricing levels based on the number of items ordered.

Step 5. Enter information for a pricing tier (include decimal for cents).

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

<<< back to item page

Enter lowest quantity of a tier level and its price.

104 - Document Copies

Quantity Discount: Purchasing 1   results in the reduced price of $ .25

Amount   Price

variable

Update   Done

Step 6. The "Update" button sets the parameters for that tier.

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

<<< back to item page

104 - Document Copies

Quantity Discount: Purchasing [ ]   results in the reduced price of $ [ ]

Amount   Price

1 - 1000 $0.25 [remove]

Update   Done

Maximum quantity is defined in "Other Options" screen (please see previous page)

Step 7. Add another pricing tier.

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

<<< back to item page

Next level of quantity discount and its associated price

104 - Document Copies

Quantity Discount: Purchasing 50   results in the reduced price of $ .15

Amount   Price

1 - 1000 $0.25 [remove]

Update   Done

About Idaho
Business
Education
Jobs & Labor
Government
Health & Family
Laws & Rules
Tourism & Transportation

Step 8. The "Update" button automatically adjusts for the new parameters.

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

About Idaho
Business
Education
Jobs & Labor
Government
Health & Family
Laws & Rules
Tourism & Transportation

<<< back to item page

104 - Document Copies

Quantity Discount: Purchasing [_____]   results in the reduced price of $ [_____]

Amount	Price
1 - 49	$0.25 [remove]
50 - 1000	$0.15 [remove]

Tier levels adjusted to new pricing variable

[Update] [Done]

Example of a completed pricing structure for an item with a quantity discount:

PayPort Catalog Manager

[Edit Catalogs] [Print Catalogs] [Manage Groups] [Manage Users] [Required Sales Data] [Receipt]

About Idaho
Business
Education
Jobs & Labor
Government
Health & Family
Laws & Rules
Tourism & Transportation

<<< back to item page

104 - Document Copies

Quantity Discount: Purchasing [_____]   results in the reduced price of $ [_____]

Amount	Price
1 - 49	$0.25 [remove]
50 - 74	$0.15 [remove]
75 - 99	$0.20 [remove]
100 - 199	$0.10 [remove]
200 - 1000	$0.05 [remove]

[Update] [Done]

"Print Catalog" View
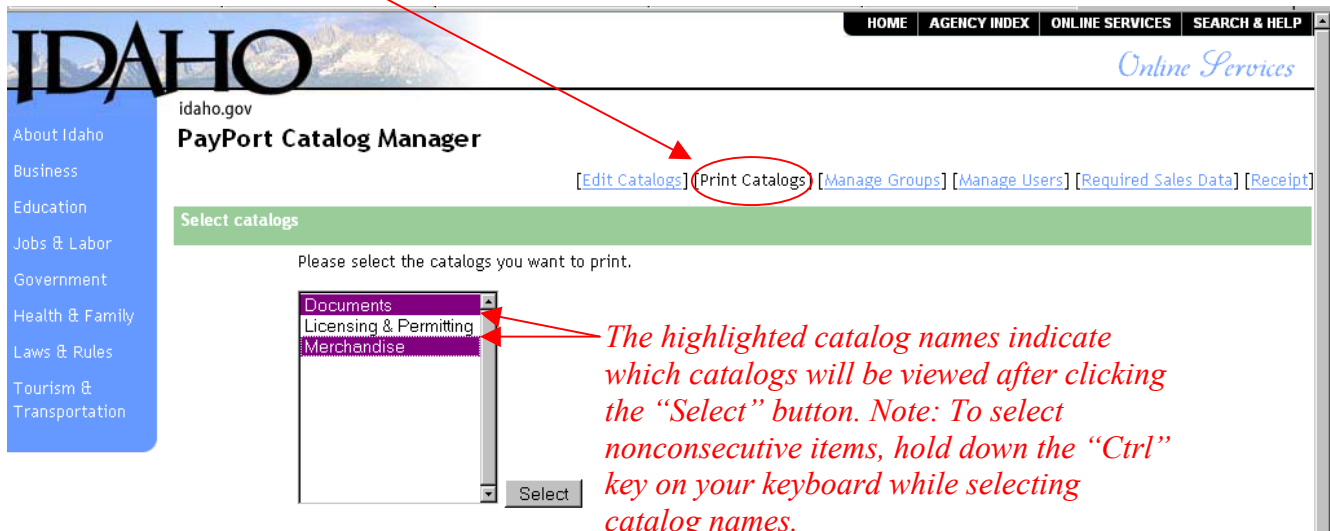
104	Document Copies	1 -	49	$0.25	exempt
		50 -	74	$0.15	
		75 -	99	$0.20	
		100 -	199	$0.10	
		200 -	1000	$0.05	

Section 6: Printing Catalogs

***Step 1.*** **The "Print Catalogs" button displays and/or prints one or more catalogs.**

The highlighted catalog names indicate which catalogs will be viewed after clicking the "Select" button. Note: To select nonconsecutive items, hold down the "Ctrl" key on your keyboard while selecting catalog names.

Step 2. **After printing your selected catalog list(s) (example below), use your browser's back arrow button to return to the PayPort administration page.**

Catalog Number	Description	Price			Sales Tax
100	Document Request			$10.00	exempt
900	Shipping (Regular USPS Delivery)			variable	exempt
101	Document Search			$3.00	exempt
102	Document Filing			$3.00	exempt
103	Amended Filing			$3.00	exempt
104	Document Copies	1 -	49	$0.25	exempt
		50 -	74	$0.15	
		75 -	99	$0.20	
		100 -	199	$0.10	
		200 -	1000	$0.05	
105	Diskette/CD			$5.00	exempt
106	Batch Filing (XTML)	25 -	0	$4.00	exempt
		1 -	24	$4.00	
		25 -	9999999999	$4.00	
107	Recording Fee			$7.50	exempt
108	Processing Fee			$10.50	exempt
800	Fax (per page)			$0.50	exempt
901	Shipping (2-Day Air)			$7.50	exempt
902	Shipping (Overnight)			$15.00	exempt
300	PayPort T-Shirt, X-Small (taxable)			$9.95	

Section 7: Managing Groups

Because catalogs and users are both assigned to groups, you can easily control user access to catalogs.
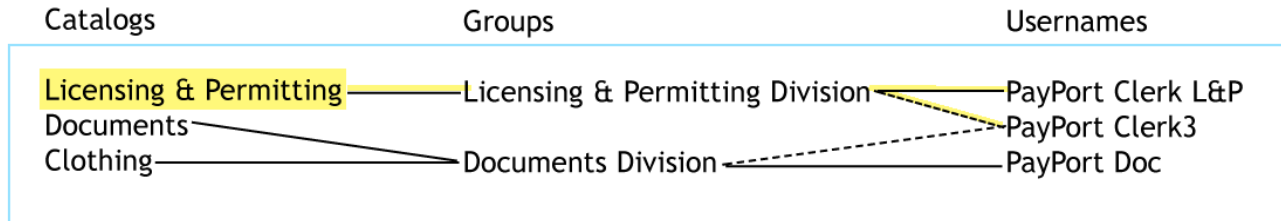
The diagram above illustrates that PayPort Clerk 3 belongs to both Groups (Licensing & Permitting Division and Documents Division), which allows the clerk to access all three catalogs.

Selecting the "Manage Groups" link allows you to create new groups and edit existing ones.

Selecting an existing group name allows you to view and edit which catalogs are associated with it (see next page).

To add a new group, simply type the desired group name and select the "Create" button.

Editing a Group*.* **Select the boxes next to the catalog names you would like associated with a group and select "Save." To deselect a catalog, click on its check mark (it will disappear) and hit "Save."**

Selecting this link allows you to view and edit other groups.

Note: Groups cannot be deleted in PayPort. If you do not want to use a particular group, make sure no catalogs are associated with it.

Section 8: Managing Users

Selecting the "Manage Users" link allows you to edit receipt text, change inactivity timeout, and associate users with a group. *Note: Users cannot use PayPort unless they are associated with at least one group.*

Step 1. **Select a username to edit parameters for that user.**

Step 2. **Edit user parameters and use the "Save" button to apply changes.**

Section 9: Required Sales Data

The "Required Sales Data" link allows you to control which transaction fields are hidden, shown but optional, required when credit/debit card is not present, or always required.

Sample sales data Clerk screen:

Section 10: Receipt

The "Receipt" link allows you to customize the information at the top (header) and bottom (footer) of your receipts.

*2000 character limit
(no more than 80 lines)
in each field*

*Don't forget to
click here to apply
your changes.*

Section 10: Receipt

*PayPort **On-screen Receipt** Example (does not display header or footer):*

Transaction ID (receipt number)

Your agency's order number (optional)

Credit/debit card number

Entered in "Note" field—not searchable (Section 5, Step 3)

Entered in "Comment" field on Clerk's transaction screen—searchable

Billing/shipping/contact info

Transaction stage indicator

Logged in as: PayPort Clerk3 Logout

Purchases | Find Receipt

Receipt
3169 - Card Present Transaction
Order #787659: 01/07/2005 12:59 PM

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

Item	Price	Qty	Comment	
Document Filing	$ 3.00	1		$ 3.00
License Duplicate	$ 5.00	1		$ 5.00
Shipping (Regular USPS Delivery)	$ 1.87	1	Postage to Denver	$ 1.87

Subtotal	$ 9.87
Sales Tax	$ 0.00
Processing Fee	$ 1.30
Total	$ 11.17

For license #48938205

Billing Address
Simple Simon
P.O. Box 1060
Firth, ID 83236

v:303-555-1212

simplesimon@pie-man.com

Shipping Address
Simple Simon
1200 W. Main Street
Denver, CO 80220

① ② ③ ④ ⑤

New Transaction | Print

*PayPort **Printed Receipt** Example:*

```
PayPort Agency
999 W. Main St., Ste. 910         }  Header
Boise, ID 83702-9011
Phone: (208) 332-0102

3152 - Card Present Transaction                    Internal order number (optional)
Order #787659  7/29/2004 02:24 PM
Sale by Donna Teller                               Receipt text (Section 8, Step 2)

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

For license #48938205
Document Filing                    1 @          3.00              3.00
License Duplicate                  1 @          5.00              5.00
Shipping (Regular USPS Delivery)   1 @          1.87              1.87
                                              Subtotal:        $ 9.87
                                            Sales Tax:         $ 0.00
                                       Processing Fee:         $ 1.30
                                               Total:         $ 11.17

                                                          Page 1 of 1

Simple Simon
P.O. Box 1060                  }  Billing information
Firth, ID  82639
ph: 208-555-9282  simplesimon@pie-man.com
Thanks for your order!
                                                        }  Footer
Signature:_____
```

Header

Items

Comment (searchable)